

## Robert Spallina

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**From:** Robert Spallina  
**Sent:** Monday, December 03, 2012 1:36 PM  
**To:** 'Pam Simon'  
**Cc:** Ted Bernstein; Simon David Scooter; Simon Pam  
**Subject:** RE: Proceeds

Yes – but Eliot's counsel will probably hold things up

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**From:** Pam Simon [mailto:pambsimon@icloud.com]  
**Sent:** Monday, December 03, 2012 12:12 PM  
**To:** Robert Spallina  
**Cc:** Ted Bernstein; Simon David Scooter; Simon Pam  
**Subject:** Re: Proceeds

Hi Robert - scooter will send you but can you send out for signatures? Thanks

On Dec 3, 2012, at 9:48 AM, Robert Spallina <rspallina@tescherspallina.com> wrote:

Please have him send me the document for my review and copy all. I want to make sure we have an agreement among all before I speak to the carrier.

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**From:** Pam Simon [mailto:pambsimon@icloud.com]  
**Sent:** Sunday, December 02, 2012 7:39 AM  
**To:** Robert Spallina  
**Cc:** Ted Bernstein; Simon David Scooter; Simon Pam  
**Subject:** Re: Proceeds

Hi Robert - can you call Scooter as he has a copy of the document you can circulate for signatures to release the proceeds. 312-909-0369 Thx

On Nov 19, 2012, at 12:14 PM, "David (Scooter) Simon" <dsimon@stpcorp.com> wrote:

May be available to achieve Si's intended results through waiver and settlement agreement.

Please have Mr. Spallina call my cell phone 312 909 0369

On Nov 19, 2012, at 1:11 PM, "Pam Simon" <pambsimon@icloud.com> wrote:

Is the 2000 trust an irrevocable trust? ←

On Nov 19, 2012, at 11:57 AM, Robert Spallina  
<rspallina@tescherspallina.com> wrote:

We are not responding to them with the document from 2000. We discussed that and you are carved out under that document. We need to find the 1995 trust ASAP

What 2000 Trust, they hid this from Carrier, Federal Court, Probate Court and Beneficiaries, with intent apparently. Holy Cow Batman!!!

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**From:** Pam Simon [mailto:pambsimon@icloud.com]  
**Sent:** Monday, November 19, 2012 12:56 PM  
**To:** Ted Bernstein

**Cc:** Robert Spallina  
**Subject:** Re: Proceeds

Pls send the executed trust document before u  
respond to heritage


On Nov 19, 2012, at 9:13 AM, Ted Bernstein  
<[tbernstein@lifeinsuranceconcepts.com](mailto:tbernstein@lifeinsuranceconcepts.com)> wrote:

Highly unlikely they will use another  
trust - what is SOP when doc can't be  
found?

Ted Bernstein  
561-988-8984

Sent from my Samsung Galaxy Note™

----- Original message -----  
Subject: RE: Proceeds  
From: Robert Spallina  
<[rspallina@tescherspallina.com](mailto:rspallina@tescherspallina.com)>  
To: Pam Simon  
<[pambsimon@icloud.com](mailto:pambsimon@icloud.com)>  
CC: RE: Proceeds



Who is carving up these  
email headers and pasting  
parts and hiding header info  
and why???

Heritage responded back that they need a  
copy of the trust instrument.  
We do not have a copy and the only  
executed trust document that we have  
in which the policy is listed as an asset is the  
2000 trust prepared by  
Al Gortz.

-----Original Message-----  
From: Pam Simon  
[<mailto:pambsimon@icloud.com>]  
Sent: Friday, November 16, 2012 2:35 PM  
To: Robert Spallina  
Cc: Bernstein Ted  
Subject: Proceeds

Hi Robert - any word on the proceeds ?  
Need help? Pam